



Guided Practice 16

Retiree Insurance Reports

August 11, 2017

This guide will walk you through how to view and download retiree insurance reports.

This guided practice assumes you already know how to:

- Log in to MyTRS
- [Enter retiree insurance deductions](#)

For additional information and troubleshooting please contact your district's assigned ESU representative or EmpSup@trb.state.ma.us

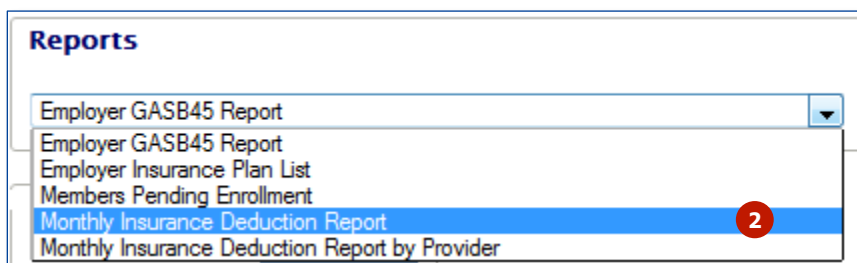
Viewing and Exporting Retiree Insurance Reports

MyTRS allows employers to view and download four distinct reports to manage their insurance process and meet their reporting needs.

1. Select “Insurance Deduction Reports” from the home page or from the “Go To” drop down list at the top of the page.



2. From the “Reports” drop down list, choose the report you need. In this example, we chose the “Monthly Insurance Deduction Report” option.



3. Enter the report month and year and click **Show Report**.

A screenshot of a web application form titled "Reports". The form contains a dropdown menu with "Monthly Insurance Deduction Report" selected. Below the dropdown, there are two input fields: "Employer Code:" with the value "9005" and "Month:" with the value "07/2017". Both input fields are highlighted with a red circle containing the number 3. Below these fields is a button labeled "Show Report".

The report month defaults to the current month. You may need to change this date if this month's retirement warrant hasn't been processed, or if you want to access a report for a prior month.

4. Once the report displays, click **Export** in the top right corner of the screen.

Home > Retiree Insurance > Insurance Deduction Reports

Reports Viewer

Show Parameters

Note

Do not use the Browser's Print Option for printing this report. Please use the Print icon in the window below to print this report.

Monthly Insurance Deduction Report

Export

Page: 1 of 5 — + Automatic Zoom

Monthly Insurance Deduction Report for 07/2017

Employer: 0230 - BELLINGHAM PUBLIC SCHOOLS

Total Premium: \$48,147.56

No. of Members: 120

Name	SSN	MED	MED 2	MED 3	LIFE	OPT LIFE	DENTAL	VISION	Total Premium
ADAMS, ADAM	XXX-XX-0953	278.93	278.93	0.00	0.28	0.00	120.78	0.00	\$ 678.92
BIOLOGY, BOBBY	XXX-XX-4709	278.93	0.00	0.00	0.28	0.00	0.00	0.00	\$ 279.21
CARLISLE, CARLY	XXX-XX-8141	406.97	0.00	0.00	0.00	0.00	0.00	0.00	\$ 406.97
DINOSAUR, DINO	XXX-XX-9395	406.97	278.93	0.00	0.56	0.00	0.00	0.00	\$ 685.46
ENGLISH, EMILY	XXX-XX-4959	278.93	0.00	0.00	0.28	0.00	40.97	0.00	\$ 320.18
FRENCH, FRANCOIS	XXX-XX-8741	278.93	0.00	0.00	0.28	0.00	120.78	0.00	\$ 399.99

- a. The report can be exported to PDF, Excel, or CSV. Choose the program of your choice and follow the prompts to complete the export process. The file can be saved with the chosen program. MTRS recommends exporting to a CSV file and opening the report in Excel.

Export Report - Mozilla Firefox

Commonwealth Of Massachu... (US) https://mytrsprd.trb.state.ma.us/v3prod/app?service=external/JasperRep

Close

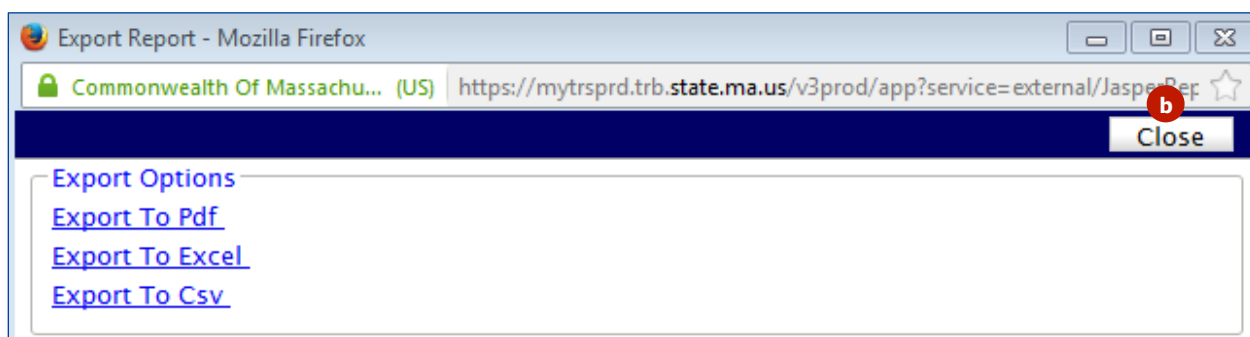
Export Options

[Export To Pdf](#)

[Export To Excel](#)

[Export To Csv](#) **a**

- b. Once the data has been exported click **Close** in the top right of the screen.



5. To go back to the main Insurance Deduction Reports page, click **Show Parameters**.

Home > Retiree Insurance > Insurance Deduction Reports

Reports Viewer

5 Show Parameters

Note

Do not use the Browser's Print Option for printing this report. Please use the Print icon in the window below to print this report.

Monthly Insurance Deduction Report

Employer: 0230 - BELLINGHAM PUBLIC SCHOOLS
Total Premium: \$48,147.56
No. of Members: 120

Name	SSN	MED	MED 2	MED 3	LIFE	OPT LIFE	DENTAL	VISION	Total Premium
ADAMS, ADAM	XXX-XX-0963	278.93	278.93	0.00	0.28	0.00	120.78	0.00	\$ 678.92
BIOLOGY, BOBBY	XXX-XX-4709	278.93	0.00	0.00	0.28	0.00	0.00	0.00	\$ 279.21
CARLISLE, CARLY	XXX-XX-8141	406.97	0.00	0.00	0.00	0.00	0.00	0.00	\$ 406.97
DINOSAUR, DINO	XXX-XX-9395	406.97	278.93	0.00	0.56	0.00	0.00	0.00	\$ 685.46
ENGLISH, EMILY	XXX-XX-4059	278.93	0.00	0.00	0.28	0.00	40.97	0.00	\$ 320.18
FRENCH, FRANCOIS	XXX-XX-8741	278.93	0.00	0.00	0.28	0.00	120.78	0.00	\$ 399.99

6. From the main page you can generate the same report for a different month or choose a different type of report.

The screenshot shows a web application interface titled "Reports Viewer". Below the title bar, there is a section labeled "Reports". Inside this section, there is a dropdown menu currently displaying "Employer Insurance Plan List", which is highlighted with a red circle containing the number 6. Below the dropdown menu, there are two input fields: "Employer Code:" with the value "9005" and "As Of Date:" with the value "//". The "As Of Date:" field is also highlighted with a red circle containing the number 6. To the right of the "As Of Date:" field is a calendar icon. Below these fields is a button labeled "Show Report", which is also highlighted with a red circle containing the number 6.